



SalesMethods

Plan2Prosper & Plan2Close

Release Notes

Version 4.0+



What's new in v4?

SalesMethods Lightning Experience

With the **Plan2Prosper** & **Plan2Close** fresh, clean and contemporary Lightning look we now offer our customers a more intuitive experience.

We have also improved and enhanced the workflow, which means less clicks, so you can see your results with less effort.

We have added some new features that enable your Team to provide evidence and gain Management approval more rapidly and effectively...

- The **Question Chat** facility to enable discussion on each Question.
- The **Evidence File** attachment to provide proof of the Evidence.
- New Statuses: 'in Progress' and 'Management Request' to complete the process.

And very importantly, the back-end technology and structure remain the same, so as with previous releases, there won't be any continuity or security issues when you upgrade to v4.

The screenshot displays the SalesMethods Lightning Experience interface for an opportunity named "SUMMIT: EnterpriseAccounts: Gold: 20 Users [50%]". The interface includes a top navigation bar with options like "Follow", "Edit", "New Case", and "New Note". Below this, there's a section for "Stage: Perception Analysis" with a progress bar and a "Mark Stage as Complete" button. The main content area is divided into several sections:

- Details Plan2Close:** A table with columns for "Qualification", "Differentiation", "Justification", and "Influence". Each row contains a number, a description, and a status indicator (checkmark, arrow, or X).
- Plan Risk:** A donut chart showing 36% completion, with a callout box that says "You may want to consider Buying Criteria Strategy".
- P2C Percentage Completed:** A donut chart showing 50% completion.
- P2C Questions Completed:** A funnel chart showing 8 (50%) questions completed, with a legend for "Stage Status" (1: Incomplete, 2: Feedback Required, 3: In Progress, 4: Completed).



Release Notes

v4.20

Improvements

- Increases the row limit in the question editor for groups.

v4.10

Improvements

- This version adds the ability to relate activities to Plan2 questions. You need to create your task or event first, you can then either assign the activity to a question, or from the question, assign the activity. The activities are listed in the Plan overview export.

v4.09

Improvements

- This fixes the crash in the Closing Plan introduced by the new activity/question assignment system.

Thank you for reading this

For any questions or further support on
install [Plan2Prosper](#) & [Plan2Close](#) please
go to <https://salesmethods.com/support/>
and complete the form.

